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THE IMPACT OF SPECIAL EVENTS ON HISTORIC HOUSE MUSEUMS

Lindsay Skads Hannah

A THESIS

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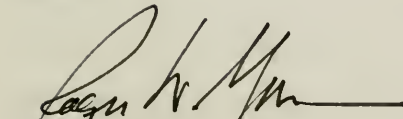
Historic Preservation

Presented to the Faculties of the University of Pennsylvania in

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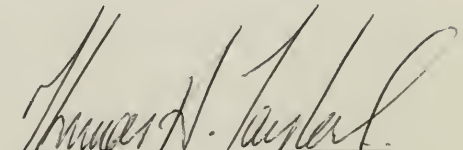
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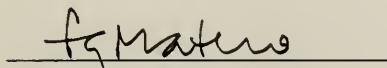
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## Chapter 1: Introduction

At the beginning of the 21<sup>st</sup> century, historic house museums are faced with challenges regarding their structures, collections, educational programs, staff requirements, and role within society. New financial obligations appear almost daily, as historic house museums struggle to comply with regulations and compete with one another for grants and the visitor dollar. Historic house museums are forced to establish their relevance and livelihood within society, or risk closing their doors. In order to survive, many historic house museums have turned to renting for special events as a means to boost their budget. This non-traditional approach has met with criticism; after all, Ann Pamela Cunningham, the doyenne of Mount Vernon, refused to hold special events on the grounds of the plantation, regardless of the financial needs of the Mount Vernon Ladies Association.<sup>1</sup> With the emphasis on financial issues, the initial goals of the museums are waylaid, and often lead to the abuse of the historic structure, collections, and the museum. As noted by Charles B. Hosmer, Jr., in *Presence of the Past*, “It was hard to mix sordid economic considerations with something as uplifting as the preservation of buildings that represented the past.”<sup>2</sup> In this thesis, the impact of special events on historic house museums will be examined, in terms of what types of influences these events exert upon the historic house museum, as well as what museums can do to mitigate the risk.

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<sup>1</sup> Edward P. Alexander, *Museum Masters* (Nashville, TN: American Association for State and Local History, 1983), 1985.

<sup>2</sup> Charles B. Hosmer, Jr., *Presence of the Past: A History of the Preservation Movement in the United States before Williamsburg* (New York: G. P. Putnam’s Sons, 1965), 297.



A historic house is “an historic document of an earlier way of life, not only in terms of the structure, but also in terms of its furnishings” according to Charles F. Montgomery.<sup>3</sup> He classifies historic houses into four categories. First is the “biographical house”, which are the ones that retain original furnishings and spaces, and often represent the life of one particular individual or family. The second category is the “moment shrine”, dedicated to one particular historic event, or the birth or death of a significant historical figure. The next category, the “era house”, is not linked to one person, but represents the general *zeitgeist* of a particular period. Finally, the “area house” interprets the characteristics and idiosyncrasies of a particular geographic region.<sup>4</sup>

By combining these definitions with the National Register of Historic Places eligibility requirements, the definition of a “historic house” begins to come into focus. To be listed on the National Register, the site must have the components of significance, integrity, and age. Significance is determined through a connection to a historical event, a link to a historical figure, architectural or construction related importance, or the “potential” to give forth information about the past.<sup>5</sup> Integrity is linked to “historic qualities including location, design, setting, materials, workmanship, feeling, and association.”<sup>6</sup> Therefore, a historic house is generally at least fifty-years old, has a defined type of significance that can be

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<sup>3</sup> Charles F. Montgomery, “The Historic House—a definition,” *Museum News* Vol. 38, No. 1 (September 1959): 13.

<sup>4</sup> *Ibid.*, p. 13-14.

<sup>5</sup> U.S. Department of the Interior, National Park Service, *Guidelines for Completing National Register of Historic Places Forms* (Washington, D.C.: National Park Service, 1977; revised, Washington, D.C., National Park Service, 1997), 1.

<sup>6</sup> *Ibid.*, p. 1.



proved on the national, state, or local level, and retains a proportionate amount of its integrity.

Defining a museum is a much knottier task. The American Association of Museums (AAM) defines a museum by the following characteristics:

a legally organized not-for-profit institution or part of a not-for-profit institution of government entity; be essentially educational in nature; have a formerly stated mission; with one full-time paid professional staff person who has museum knowledge and experience, and is delegated authority and allocated financial resources sufficient to operate the museum effectively; present regularly scheduled programs and exhibits that use and interpret objects for the public according to accepted standards; have a formal and appropriate program of documentation, care, and use of collections and/or tangible objects; and have a formal and appropriate program of maintenance and presentation of exhibits.<sup>7</sup>

The International Council of Museums (ICOM) defines a museum in a similar manner, identifying the collections and role of the public as essential components of a museum.<sup>8</sup> In *The Museum in Transition*, Hilde Hein defines the museum as “a collection of entities held to have sundry intrinsic worth but whose value is greatly enhanced by the act of gathering and preserving the discrete items as a totality in one place.”<sup>9</sup> The key components of a museum are the collections, and all the activities it implies, such as acquiring, cataloguing, and exhibiting, and having that collection available to the public on some semblance of a regular schedule. However, conflict is inherent within these ideas. What is best for the collections is not always what the visitor desires, especially in terms of accessibility and environment.

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<sup>7</sup> American Association of Museums, Museum Accreditation Standards, in

<sup>8</sup> *ICOM Code of Professional Ethics*, in Gary Edson and David Dean, *The Handbook for Museums* (London: Routledge, 1994; reprint, London: Routledge, 1996), 241.

<sup>9</sup> Hilde S. Hein, *Museums in Transition* (Washington: Smithsonian Institution Press, 2000), 3.





The American preservation movement has been inextricably linked with the historic house museum. From the preservation of George Washington's headquarters at the Hasbrouck House in New York to Graceland in Tennessee, historic houses represent a broad range of people, events, functions, eras, and social ideals. Whether saved by a national movement or by a local organization, these historic houses connect in some way to the people that protected them. The historic house movement began with the preservation of Mount Vernon, and has functioned under the long shadow of Washington's home ever since. In 1856, Ann Pamela Cunningham formed the Mount Vernon Ladies Association (MVLA), dedicated to the cause of purchasing and rehabilitating Washington's home overlooking the Potomac. By 1860, the organization had managed to co-ordinate the funds necessary to purchase the property for \$200,000.<sup>10</sup> The success of the MVLA triggered preservation activities elsewhere. The buildings that were deemed worthy of saving often exhibited some of the same criteria. For the most part, the structures were linked to a "great man", often one associated with the American Revolution or the early history of the country. Thus, the preservation of George Washington's Mount Vernon triggered the purchase of Andrew Jackson's The Hermitage and George Mason's Gunston Hall.<sup>11</sup> In the South, the same concept was played out, but the "great man" might be connected the romanticism of the Civil War and the Antebellum South. With the purchase of Robert E. Lee's Stratford Hall, both the Revolutionary and Civil War figures were honored.

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<sup>10</sup> Edward P. Alexander, *Museums in Motion* (Nashville, TN: American Association for State and Local History, 1979), 89.

<sup>11</sup> *Ibid.*, p. 89.



These activities established a pattern for the early days of the preservation movement in the United States. The MVLA functioned as a role model. Most of these early efforts were typified by funding from private sources, value based on who was associated with the house, and not social or architectural reasons, and that a number of these movements were instigated by women.<sup>12</sup> Therefore, by the close of the nineteenth century and the start of the twentieth, historic houses had been rescued from a variety of dangers by the efforts of a number of concerned individuals.

Once the building was saved, though, the question arose about what to do with it. Again, Mount Vernon cast a long shadow, for the “idea of preserving old houses and opening them to the public has spread with gradually increasing rapidity since Miss Pamela Cunningham organized a group of ladies in 1856 to save Mt. Vernon.”<sup>13</sup> The historic houses now functioned as a museum or shrine dedicated to the great man that triggered the preservation in the first place. Given that the very structures were saved in order to provide patriotic inspiration to the visitor, the use should follow the same ideal, linking the furnishings and interiors with the great man. The hope of these early preservationists, as described by Charles B. Hosmer, Jr., was that “historic house museums would contribute to patriotic education. Many earnest individuals believed that revived patriotism could help cure some of the social and political ills that were current in the United States.”<sup>14</sup> As part and parcel of the patriotic goal, the house museum presented static exhibits of the structures and furnishings, allowing the visitor to assure himself of the legitimacy of the United States, as

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<sup>12</sup> William J. Murtagh, *Keeping Time: The History and Theory of Preservation in America* (New York: John Wiley & Sons, Inc., 1997), 30.

<sup>13</sup> Montgomery, “The Historic House,” 12.



well as validate his own goals towards prestige and affluence.<sup>15</sup> Thus, museums were established within these houses, in order to fully convey the patriotic mission.

In the preservation frenzy to save a building, the belief arose that once the building was free and clear, and open to the public, it would essentially take care of itself through admission fees. A public, mindful of the importance of the building and the people associated with it, would be willing to pay a fee to tour a historic house. However, low attendance fees coupled with low attendance rates made this dream an unreality.<sup>16</sup> Alternate uses were sought for historic buildings. For example, in 1887 the Concord Antiquarian Society purchased the Reuben Brown House in Concord, Massachusetts for use as their headquarters.<sup>17</sup>

Questions related to the necessity of these historic house museums, as well as their care and operation, remained unaddressed, however. By the early twentieth century, tourism flourished via the automobile and the increased mobility it offered. Communities viewed historic house museums as a commodity for bringing in tourist dollars, and therefore sought out their development as commercial ventures, believing, as mentioned above, that attendance fees would take care of the maintenance. For example, the Ford Mansion, in Morristown, New Jersey, had approximately 8,000 visitors to the site in 1887. In 1915, 11,000 people visited the mansion. The number increased steadily, with the total reaching 21,000 in 1926, roughly 2 ½ times the number of visitors as 1887. While slow, attendance

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<sup>14</sup> Hosmer, *Presence of the Past*, 264.

<sup>15</sup> Murtagh, *Keeping Time*, 30.

<sup>16</sup> Hosmer, *Presence of the Past*, 293.

<sup>17</sup> *Ibid.*, p. 267.



did increase, but the income generated by ticket sales was insufficient for the care of the property, partially due to low entrance fees.<sup>18</sup>

But the shift from home to memorial results in conflict and compromise. Houses were never intended to function as museums and therefore cannot offer, except with supreme difficulty, the kind of support necessary for the museum. The preservation needs of the house are often at odds with the conservation needs of the collection.<sup>19</sup> In order to be a true representation of a historic house museum, neither the collections nor the building can take precedence over the other. However, the Mount Vernon model, that museums were the best function for historic houses, persisted. The private organizations dedicated to preservation efforts continued to believe that the public would support the maintenance of these structures through admission fees well into the 1950s.<sup>20</sup> Again, preservationists began to question the necessity for the retention of all these historic houses, particularly those operating as museums. An article published in 1959 quotes a director of an unnamed historic house, claiming that only two historic house museums in the United States are able to function on ticket sales alone—his and Mount Vernon.<sup>21</sup> Kenneth Chorley, head of the Colonial Williamsburg Foundation, said, “There is a limit to historic preservation.”<sup>22</sup>

Adding to the mix was the American Association of Museums (AAM). By the 1960s, museums of all kinds were seeking government recognition as educational

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<sup>18</sup> Ibid., p. 293.

<sup>19</sup> Thomas H. Taylor, Jr., “Museums in Historic Buildings.” *APT Bulletin* Vol. XXVII, No. 3 (1996): 7.  
<sup>20</sup> Charles B. Hosmer, Jr., *Preservation Comes of Age: From Williamsburg to the National Trust, 1926-1949* (Charlottesville, VA: University Press of Virginia, 1981), 227.

<sup>21</sup> Charles C. Wall, “The Mount Vernon Experience.” *Museum News* Vol. 38, No. 1 (September 1959): 21-22.

<sup>22</sup> Hosmer, *Presence of the Past*, 260.







institutions, therefore providing them eligibility for federal funding. Also, the Internal Revenue Service was seeking to clarify the definition of “non-profit”, in order to eliminate those transgressors who had received tax-exempt status, yet were not qualified for such a position.<sup>23</sup> Through the AAM, the museum profession sought to identify museums in such a way that their educational value was made clear, yet retained their non-profit status. Thus, the organization clearly defined museums within certain parameters, as addressed previously. As part of this process, in 1971 the AAM established its accreditation program, a method for determining a certain level of professionalism within a museum.<sup>24</sup> By codifying the standards and practices, the AAM established museum standards, in terms of governance, conservation, collections management, interpretation, presentation, and administration.

While increasing standards, museums continued to face funding problems and fought to survive. While traditional notions of a museum suggest institutions created for preserving certain aspects of cultural heritage and educating the public, modern day museums must also face economic survival. As described by Marjorie Schwarzer:

Traditional sources of funding—such as deeply pocketed patrons and government agencies—have become more tenuous. Operating costs have risen. More important, the museum profession has become passionately populist. Control of the museum, formerly the exclusive domain of patron and scholar, is now shared by marketer and visitor. Today’s museums are schizophrenic agoras; they seek to retain their lofty status (at least implying a kind of cultural elitism) and at the same time engage more diverse, larger, and novice audiences. Less isolated, museums are part of a vital and growing

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<sup>23</sup> Susannah Cassedy O’Donnell, “AAM Accreditation: Celebrating 25 Years.” *Museum News* Vol. 75, No. 3 (May/June 1996): 42.

<sup>24</sup> American Association of Museums, “Museum Accreditation: Criteria and Characteristics” from [www.aam-us.org](http://www.aam-us.org)



cultural tourism and entertainment industry. Institutions now find themselves forced to reconcile the competing functions of marketing and mission.<sup>25</sup>

When faced with the insufficiency of traditional forms of income, and facing higher standards for which traditional sources were no longer adequate, museums must seek out alternate ways to provide for themselves. A range of options exists for the museum to bring in extra income. Traditional means include raising admission rates and retail sales such as museum store revenues and mail order catalogues, but non-traditional means were also explored, such as product licensing, book and video publication, restaurants and cafes, rental of facilities for special events, catering, and selling mailing lists.<sup>26</sup>

Holding events for the purposes of raising money for a museum is nothing new. Ann Pamela Cunningham recommended hosting special events for the benefit of Mount Vernon, as long as the events did not take place on the plantation grounds.<sup>27</sup> Historic house museums throughout the United States hold these fundraising type events. For example, the Sieberling Mansion in Kokomo, Indiana, hosts an annual wine tasting as a means of bolstering the museum funds.<sup>28</sup> Plus, museums have gatherings, parties, and the like for their own Board of Visitors or Trustees. These types of events are held at the discretion of the museum.

But there exists a second type of special events that some museums embrace. Beyond the events sponsored by the museum, the museum can elect to open its doors for

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<sup>25</sup> Marjorie Schwarzer. "Schizophrenic Agora." *Museum News* Vol. 78, No. 6 (November/December 1999): 41.

<sup>26</sup> Andy Leon Harney, "Money Changers in the Temple?: Museums and the Financial Mission." *Museum News* Vol. 71, No. 6 (November/December 1992): 39.

<sup>27</sup> Edward P. Alexander, *Museum Masters* (Nashville, TN: American Association of State and Local History, 1983), 185.

<sup>28</sup> Kelly Thompson, Executive Director of Sieberling Mansion, 19 March 2001, phone interview.



outside groups to host events within the museum facilities. Such uses are appealing, most particularly the apparent financial gain, and secondary advantages include an extended awareness within the community and increased number of visitors. But the special event and the associate activities affect every aspect of the museum. Behind the Siren call of the special events lies definite risk.

While there are some obvious costs, such as staff overtime and potential damage to the collections, there are hidden costs, such as increased maintenance requirements or damage to original fabric. The museum may gradually make decisions based on the needs of special events, and not for the advancement of the educational programs, building preservation, or collections care.

For this thesis, an informal survey of special events policies was taken from 58 historic house museums scattered across the United States.<sup>29</sup> No specific type of historic house museum was sought; the subjects represent a range of sites featuring several periods of interpretation, size, visitors, budgets, owners, and notoriety. Those involved with the development and execution of the above special events policies were interviewed. These individuals ranged from executive directors to site managers to special events coordinators to public relations staff. The interviewees answered a range of questions related to the type of policy held by their individual site. Typical questions included:

- What types of events are held at your site?

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<sup>29</sup> For the list of historic house museums, see Appendix A, pp. 49.



- Approximately how many events are held a year?
- How long has your site been hosting events?
- Why did your site decide to begin hosting special events?
- What type of restrictions do you place on those renting your site?
- Has your policy been altered or changed regarding special events? If so, why?

For the most part, the staff involved with the special events policies answered all the questions. Most of the interviewees promoted the financial and marketing advantages of the special events that occurred there.

The policies covered the museum's approach to special events, including:

- Where the events are held?
- How much is charged for rental of the property?
- What restrictions are placed on the event?
- Were there approved caterers?
- How many staff members were required per event?

Initially, during the early stages of research, the basic operating assumption of the author had been that while some museums hosted special events, those that knew better shunned outside rental. Recognizing that despite all the seductive financial gain offered by special events, certain museums held to a higher moral ground, and refused to succumb.





These museums recognized the implications that renting out their facilities would have on their building, collections, and museum. Furthermore, certain organizations that owned or operated several historic house museums, such as the National Trust for Historic Preservation (NTHP), or the Society for the Preservation of New England Antiquities (SPNEA), and were prominent in the preservation field, would not allow special events to occur on their properties. As the research for this topic progressed, however, almost all of those assumptions were contradicted in one way or another.

The findings of this study suggest that these historic house museums have a more complicated issue to contend with. The fact that activities associated with special events can be damaging to the collections, the building, and the site is not news.<sup>30</sup> The literature related to collections care alone details the threat of such actions as relocating furniture and altering the environment, both of which are part of the special events effect on the museum. But these implications are rarely explicitly linked to special events. So, either the museum is not making the connection, or, more likely, has decided that the income generated by special events is worth the risk.

Given that several historic house museums, such as Shirley Plantation, consider special events as part of a larger marketing and community involvement plan, the proper management of special events fits special event use with an appropriate special event policy. Historic house museums generally have three options when it comes to special events.

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<sup>30</sup> See any book on collections care or historic house museums, such as *Collections Management* ed. Anne Fahy (London: Routledge, 1995); or Sherry Butcher-Young, *Historic House Museums*. (New York: Oxford University Press, 1993).



- **Category I** constitutes no outside use, where the property is not available for outside rental.
- **Category II** is a partial use scenario, wherein the museum allows for events to take place at specified locations, usually spaces that have been designated explicitly for these types of activities. Partial use often involves use of outbuildings, porches, garden, or other landscaped features.
- **Category III** contains those museums that allow for almost complete use of the facility, including any and all structures, as well as the grounds. Some limitations may be placed, but it does not prevent the museum from opening up spaces that contain significant architectural fabric or valuable collections.

In the following section, these alternatives will be discussed.



## **Chapter 2: Categories of Use**

The decision of a museum to host special events leads directly to the decision of where to host them. The spaces that function as special event rooms range from a converted carriage house to the ballroom in a mansion. The museum may also allow exterior spaces, such as porches, gardens, or lawns, to be used by outside groups. Historic house museums fall into one of the following categories, based on the extent the special event parties have access to various components of the museum. Once identifying the category it fits within, a museum can craft a matching collections policy.

### **Category I**

The historic house museums in this category permit no outside rental of the facilities, including grounds or gardens. What makes these museums exempt from the reliance on special events includes such diverse elements as a budget that does not require dependence on the extra income, notoriety that does not necessitate additional publicity, a governing body that simply elects not to open its museum for rental, or a belief in a higher standard of care for the building and collections. On the other hand, the museum may simply not have the facilities available.

These issues are often intertwined. Few museums have an international reputation that draws visitors from around the world, which increases ticket sales, the potential donor pool, and public awareness of the needs of the site. In turn, this increased awareness leads to



scholarly activities, such as archaeological investigation of lost outbuildings or changes to collections care policies. Management strategies change over time, and many museums have modified their policies to reflect a growing understanding of the effect special events have on historic house museums. Or changes in budgets or owners have ended the necessity to rent out the space.

For example, the Historic Charleston Foundation owns several historic house museums in the city of Charleston, including the Aiken-Rhett House. The organization has never rented out any of its facilities for special events, for it was deemed inappropriate for their buildings or the Foundation. Concern over the safety and welfare of the collections was the primary motivation behind their policy, with the preservation of the building a close second.<sup>31</sup>

## **Category II**

When a museum limits special events to ancillary spaces, it falls into this category. For the most part, the museum building is left exempt, while new or converted buildings function as spaces for rental. These spaces are often multi-purpose, giving the museum additional spaces to use as classrooms, auditoriums, or the like. Thus, a garage becomes a kitchen, while a carriage house seats 50 for dinner. The partial site rental usually accompanies rental of specified exterior spaces, such as gardens, patios, or courtyards.

The compromise between Category I and Category III allows the museum to gain the benefit of the special events, yet protects the historic structure and its museum collection.





Damage is kept to a minimum, since potentially harmful activities take place well away from what the museum has deemed the most significant. But the choice to host special events on site, albeit not in the main building, is not free from complications. If a museum decides to convert an 18<sup>th</sup> century carriage house into a kitchen, restroom, and dining facility for 60 people, the structure will undoubtedly lose historic character and fabric. Furthermore, if the building had previously be operating as a storage facility, particularly for portions of the collections, new housing must be found for the displaced objects. Once the building has been converted for such purposes, the irreversible nature of the modifications prevents returning it o its original purpose. Additionally, changes will have to be made to comply with local building code requirements, such as widening doors for wheelchair access and installing fire suppressions systems.

By limiting special events to secondary structures and exterior spaces, the museum is implicitly stating what it finds to be more significant. By excluding the main house, which presumably holds the important parts of the collection, the museum is clearly prioritizing silver candlesticks over oak trees. In some cases, the landscape may be more valuable than the collections.<sup>32</sup>

Examples of this category of use can be found across the United States. Several of the historic houses owned and managed by the Society for the Preservation of New England Antiquities (SPNEA) are available for outside rental. The Bowen House, in Woodstock, Connecticut, hosts weddings, receptions, meetings, and other private parties in a converted

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<sup>31</sup> Historic Property Policy, Historic Charleston Foundation, n.d.

<sup>32</sup> Lauren G. Meier, "Restoring Landscape Character at Fairsted, the Frederick Law Olmstead National Historic Site." *APT Bulletin* Vol. XXX, no. 1 (1999): 30.



carriage house and barn that is located across from the main house. The function rooms hold 80 to 100 guests, with a cap of 300 for the grounds.<sup>33</sup> As part of rental, the guests can tour the mansion. The Codman House in Lincoln, Massachusetts, has a similar policy regarding their carriage house, as does the Langdon House in Portsmouth, New Hampshire.<sup>34</sup>

Shirley Plantation has a different situation. Since the descendants of the original family still live in the main house and tours are conducted daily, special events are necessarily limited to other buildings. At Shirley, an eighteenth century tool barn has been converted especially for event use. The original kitchen building is available, also. Since the house and grounds remain open for tours during the day, certain restrictions are placed, such as no bands on site. Shirley elected to begin to offer events for the express purpose of competing for the rental dollar with other historic house museums in the area, such as Sherwood Forest.<sup>35</sup>

In Springfield, Illinois, the Dana-Thomas House maintains a tight control on the furnishings and interiors of its Frank Lloyd Wright house, by limiting functions to the courtyard and converted carriage house. Owned by the state of Illinois and run by the State Historic Preservation Agency, the Dana-Thomas House has eight to ten events a year, usually cocktail parties and small weddings. The site forbids food, drink, and any kind of partying in the main house. The rental fee does cover a tour of the house, but it is under the strict supervision of a guide. The converted carriage house also functions as the visitor center, so it

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<sup>33</sup> Special Events Policy, Bowen House, Woodstock, Connecticut, n.d.

<sup>34</sup> Special Events Policy, Codman House, Lincoln, Massachusetts, n.d.; and Special Events Policy, Langdon House, Portsmouth, New Hampshire, n.d.

<sup>35</sup> Special Events Policy, Shirley Plantation, Charles City County, Virginia, n.d.; and Trudi Jones, interview with author, 5 February 2001.



has amenities such as an auditorium, but does not have kitchen facilities. This lack of facilities results in foods that are relatively simple to prepare and serve by caterers. The Dana-Thomas House elected to host special events for the publicity, and not for fundraising. The site has only six full-time staff members, supplemented by volunteers. To cover the costs of the staff, as well as the excessive wear and tear on the site, the Dana-Thomas House charges what it perceives as a high fee for the use of the property. For two hours of site use, the group is charged \$750, with \$200 for every half-house afterwards.<sup>36</sup> The special events do not generate a great deal of income for the site, however, since 10 events a year at \$750 per event only grosses \$7,500 for the house.

### **Category III**

Several historic house museums interviewed for this thesis fall into the category of allowing virtually full access to the museum. The rental party has almost carte blanche for the site, with access to rooms and spaces that have significant interiors and collections. While some rooms may be limits, important spaces may be exposed to risk. The added responsibility often comes with an increased cost to the renter, and rates may be well above the standard rental fees of other house museums. The rates are hardly exorbitant, though. For example, in Washington, D.C., the Woodrow Wilson House rents for \$3,000 for a four-

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<sup>36</sup> Special Events Policy, Dana-Thomas House, Springfield, Illinois, n.d.; and Dr. Donald Hallmark, interview by author, 7 February 2001.



hour party for about 200 people. In the same city, the National Museum of Natural History, part of the Smithsonian complex, rents for \$15,000 for a party of approximately the same number of guests.<sup>37</sup> Additionally, the historic site may place added restrictions to what can or cannot be introduced to the building. But these increased restrictions hardly offset the disadvantages of allowing events broad access to the museum. As with the partial use scenario, the museum may make decisions based on the income of special events, and not what is best for the museum. Changes may have to be made to accommodate the events, such as kitchen conversions and additional restrooms. Plus, all of the collections are exposed to potential risk, including the main structure and fine and decorative arts.

The range of policies regarding special events is as different as the museums that use them. At the Sprague Mansion in Cranston, Rhode Island, outside groups may rent the house and the carriage house. Special events provide a significant portion of their budget, but by no means all of the expenses. For a four-hour wedding reception, the guest is charged \$750. The site does have a few restrictions, but most of the conditions are based on lack of facilities and do not originate from a position of care for the building or collections. For example, no frying can take place on the site, but that based on the limitations of the kitchen facilities. Also, guests cannot have a cash bar due to licensing purposes.<sup>38</sup>

In Duluth, Minnesota, the Glensheen Mansion rents its foyer, dining rooms, and grounds for weddings and receptions. The site only allows events during non-tour hours,

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<sup>37</sup> However, the Natural History Museum does not consider what it does as renting for special events, but rather “celebrations of a donation” where corporate members can invite whomever they choose. For a party of 250, the required donation is \$10,000, with an additional fee of \$5,000 for the wear and tear on the facility. Office of Special Events, National Museum of Natural History, 23 April 2001.







mostly from 6 p.m. to 10:30 p.m., with an extra charge for overtime. The rental costs include a tour of the house, but the tour must take place before any alcohol is served. Glensheen allows wine, beer, and champagne in the facilities, but no kegs, cash bars, or mixed drinks. An approved caterer provides all food. The site is owned and operated by the University of Minnesota, which requires the renter to carry liability insurance. The staff must authorize all decorations, and guests cannot use tacks, nails, tape, or lit candles. A senior attendant must be on site at all times during the event. If any of the collection needs to be relocated, only the Glensheen staff can move the object. The museum has additional restraints, such as no smoking, no dancing or amplified music, and no throwing of confetti, rice or litter.<sup>39</sup>

Another Minnesota mansion that allows rental, albeit in a very narrow sense, is the James J. Hill House in St. Paul. The museum only rents for conferences, classes, lectures, concerts, receptions, luncheons, and dinners, but not for weddings, birthdays, reunions, anniversaries, fundraisers, or special interest group activities. The house is owned and maintained by the Minnesota Historical Society, whose headquarters are located in a new facility nearby. The fee ranges from \$50 to \$1,000, depending on the event. The rental fee gives the party access to the music room, drawing room, meeting rooms on two floors, verandas, picture galleries, and a tour of the rest of the mansion. With the access to these spaces come very particular restrictions, such as no smoking, no red wine, no signs or decorations on historic surfaces, and all menus must avoid foods that would easily stain and damage the historic interiors. The site provides most of the standard meeting equipment,

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<sup>38</sup> Special Events Policy, Sprague Mansion, Cranston, Rhode Island, n.d.; and Mrs. Kelley, interview by author, 7 February 2001.

<sup>39</sup> Special Events Policy, Glensheen, Duluth, Minnesota, n.d.



such as folding chairs and tables, as well as A/V equipment, cutting down on the need for outside contractors to bring in their own. Additionally, the site requires one tour guide for every 25 guests, for the purposes of questions, site security, and tours. A site manager must always be on site during the course of the event.<sup>40</sup>

Sieberling Mansion in Kokomo, Indiana, has been offering site rental for the past eight years, and started it to increase revenue and visitor attendance. The Grand Porch, gardens, and ballroom are all available for rental, for the fee of \$400 for two hours. The Howard County Historical Society does not allow receptions within the mansion, but portions of the house are available for photo opportunities.<sup>41</sup>

Old Sturbridge Village, located in Sturbridge, Massachusetts, rents out two of its facilities, primarily for weddings. The ceremony is held in the Center Meetinghouse, and receptions at the Bullard Tavern. For a fee of \$1,000, the group has access to the Meetinghouse and exclusive use of the Bullard Tavern. The group is allowed to have lit candles in the chandelier and on the tables, but cannot tape or tack anything to any fixtures. The altar cannot be moved, and the organ can only be played by one of two approved Sturbridge organists. Old Sturbridge has been renting the meetinghouse for about 20 years, and it hosts 15 to 20 weddings a year.<sup>42</sup>

The National Trust for Historic Preservation (NTHP) owns twenty historic properties and operates most of them. Each site functions on its own, with direct intervention by the

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<sup>40</sup> Special Events Policy, James J. Hill House, St. Paul, Minnesota, n.d.

<sup>41</sup> Special Events Policy, Sieberling Mansion, Kokomo, Indiana, n.d.; and Kelly Thompson, Executive Director, 19 March 2001, phone interview.

<sup>42</sup> Special Events Policy, Old Sturbridge Village, Sturbridge, Massachusetts, n.d.; and Special Events Coordinator, interview by author, 6 March 2001.



NTHP. Therefore, each museum determines its own policies regarding special events. Montpelier, James Madison's home in Virginia, is available for rental by outside parties, but only hosts such events a couple times a year; in 2000 the site was rented for four weddings. Guests can rent either the lawn for \$1000 or the main house for \$2500. The party is not limited to any particular spaces, but allowed free use of all the museum room open to the public. Guards are stationed throughout, while the guests are free to move from room to room. If the house is rented out, however, no food or drink can be brought into the rooms, and the house discourages the use of glassware, for fear of accident. Montpelier does allow dining in the main house in certain areas, mostly in conjunction with local beds & breakfasts and conventions. Six to eight such events occur a year.<sup>43</sup>

Another NTHP site available for rental is the Decatur House in Washington, DC. Different portions of the site can be rented, including the carriage house, courtyard, and the Victorian parlor. The carriage house accommodates 250 people standing, or 120 seated. The courtyard holds 500 people standing, and 220 seated, while the parlors hold 85 people standing and 70 seated. All the areas can be rented together or separately. The site only allows rentals at specific times, such as daytime meetings that cannot go past 5:30 p.m. and evening events that cannot last past 1 a.m. Decatur House alters its rates for rental according to the nature of the group or event. It also has some of the highest rates found for historic house museum rental. During the week, for the carriage house and courtyard, a non-profit 501 (c)(3) pays \$2,250 for a three-hour event, while a corporate party pays \$2,750. A four-hour private event costs \$3,250. Renting the house for a meeting during the day costs

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<sup>43</sup> Nancy Alexander, Director of Special Events, interview by author, 10 April 2001



significantly less--an 8-hour meeting charges \$2,000. For the weekend, the courtyard goes for \$3,900 for a 7-hour block, allowing for a maximum of 4-hour event, or \$4,900 for a 9-hour block for a maximum 6-hour event. The clock starts when the renter or the first guest arrives and stops when the renter or last guest leaves. Any events that go over the allotted time cost an additional \$450 and hour, with an additional \$100 for clean up and break down. The Victorian parlor rents for \$5,500 for a standing reception and \$6,500 for a seated event. The site also charges a \$500 ceremony fee that applies to all rentals, which also covers the wedding rehearsal, and requires paying membership dues. During holidays or heavy rental seasons, the site also charges an additional \$50 an hour to cover the direct costs for staffing.<sup>44</sup>

At the Woodrow Wilson House, also in Washington, DC, outside parties can rent the house President Wilson moved into after he left office, even to the extent of eating in the presidential dining room. Outside groups can rent the dining room, the museum, the garden, the conference room, or any combination of those spaces. There is a 4-hour cap, ending by midnight, including clean up. To rent the dining room, the group is charged \$2,500 for a party of 40 individuals. The museum goes for \$2,000, but including the gardens raises the charge to \$3,000. The conference rooms rent for considerably less, for \$500 for a half-day and \$1,000 for a full day. Photographic or video use costs \$150 an hour. The site also charges for membership fees and staffing by the hour.

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<sup>44</sup> Special Events Policy, Decatur House, Washington, D.C., n.d.; and Darcy Romano, Director of Marketing and Site Rental, interview by author, 4 April 2001.





The Wilson House has some of the typical policy restrictions, as seen in other museums. Food and drink is allowed on the main floor only, for fear of broken glass in passageways such as the stairs. The site only allows certain pre-approved caterers and tent companies on site. Rental groups are not allowed to have dancing, live amplified music, smoking, or lit tapered candles. Since there are no cooking facilities, the caterer must work from the garage. Museum staff is required to be present at all times, and the museum director must approve all activities. The site hosts 35 to 40 events a year, predominately dinners and receptions. They have been renting the site for 15 to 20 years, and have altered the policy as needed. For example, flowers were allowed throughout the site, but are now limited to those rooms that also have the food. The policy has also been revised from just excluding red wine to excluding all red liquids, such as cranberry juice and cocktail sauce.<sup>45</sup>

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<sup>45</sup> Special Events Policy, Woodrow Wilson House, Washington, D.C., n.d.; and Sarah Andrews, Director of Site Rentals, interview with author, 4 April 2001.



### **Chapter 3: Rental Impact on the Historic House Museum**

While the financial impact of special events may be readily recognized, the other, more intangible side effects, may not be as readily apparent. The decision by a museum to host special events raises a number of issues that the museum must recognize and address in its special events policy. The main areas that the museums can expect to be affected by special events are staff, collections, buildings, and the museum. All of these issues are intertwined, and influence one another. For example, increased wear and tear leads to the hiring of additional housekeeping staff.

#### **A. Impact on Staff**

Museum staff is at the forefront during special events. They are ultimately responsible for the site during the actual event, whether it is answering questions about the site, leading tours of the house, serving as security, or monitoring the activities of the guests and caterers. According to the International Council of Museums (ICOM) *Code of Professional Ethics*:

The governing body has a special obligation to ensure that the museum has staff sufficient in both number and kind to ensure that the museum is able to meet its responsibilities. The size of the staff, and its nature (whether paid or unpaid, permanent or temporary), will depend on the size of the museum, its collections and its responsibilities. However, proper arrangements should be made for the museum to meet its



obligation in relation to the care of the collections, public access and services, research and security.<sup>46</sup>

For most historic house museums, the staff may consist of one or two full time employees, with volunteers hopefully filling any gaps. A 1990 survey of historic house museums revealed that 65% have no full time staff, with 19 to 27% with one full time staff member, with many duties being fulfilled by dedicated, yet most likely untrained, volunteers.<sup>47</sup> Therefore, the entire weight of museum staff responsibilities falls onto the shoulders of a handful of overworked people.

For the staff members themselves, special event duty may be an unwelcome task. For the unlucky staffer that draws this job, he or she must stay until the wee hours of the morning, to ensure that all the guests have left, the caterers have removed their equipment, the band has cleared out their speakers and cords, any damage that may have taken place is properly recorded and not left unattended, and any other tasks that arise with the renting of the spaces have been resolved. If the museum hosts only a few events a year the drain may not be that great, but any larger scale events or events that occur more frequently will create a constant draw on the human resources of the museum. Financially, the museum may be expending more on staff costs related to special events than initially forecast. For example, all the museums surveyed required a staff member to be present at all times during the special event, including any rehearsals, set-up and break down periods, caterer arrivals, and the like.

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<sup>46</sup> ICOM *Code of Professional Ethics* in Edson and Dean, *The Handbook for Museums*, 241.

<sup>47</sup> Peggy Coats, "Survey of Historic House Museums," *History News* Vol. 45, no. 1 (1990), 28; quoted in Sherry Butcher-Youngmans, *Historic House Museums* (New York: Oxford University Press, 1993), 6, n. 5.



does this take the staff member away from other museum responsibilities, but also  
ger overtime.

Depending on how the museum defines and classifies its employees, some or all of  
may qualify for overtime. According to federal law, employees are eligible for  
once their weekly total of hours worked exceeds 40, resulting in an hourly wage  
it to time-and-a-half. At the state level, though, overtime may be defined a bit  
y. For example, Texas adheres to the federal standard, with overtime being defined  
as an excess of forty-hours during the typical workweek.<sup>48</sup> However, in Massachusetts, state  
law dictates that overtime goes into effect once the employee has worked over eight hours in  
a day, regardless of the total hours of the week.<sup>49</sup> Additional overtime may accrue with  
special events that take place on museum-determined holidays. Furthermore, a larger event  
will require additional staff members, which leads to additional overtime costs.

Moreover, given the nature of special events, a staff member may be impressed into a  
duty that he or she may not have the training to complete, particularly when it comes to  
volunteers. During special events, a staffer will not only function as site representative, tour  
guide, and watchdog for the building and collections, but also security guard, hall monitor,  
bouncer, conservation technician, groundskeeper, housekeeper, site manager, public relations  
delegate, and host. The range of jobs and tasks that accompany all those positions require a  
great deal from the staff members, in terms of time, talent, and ability.

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<sup>48</sup> Texas, Government Code, Chapter 659.

<sup>49</sup> Massachusetts, General Code, Chapter 149.





During the course of any special event, one of the essential roles the staff plays is as security for the guests, other staff, the collections, and the building. Several texts discussing museum management emphasize the importance of security. According to G. Ellis Burcaw, in *Introduction to Museum Work*, “Security is the most important consideration in the administration of any museum.”<sup>50</sup> The International Council of Museum (ICOM) identifies the various functions of museum security personnel in its *Museum Security and Protection*. In the arson and fire section, ICOM recognizes nine different responsibilities, none of which address the needs of the collection or building.<sup>51</sup> The duties are of extreme importance, and some are obvious, such as notifying the local fire department. Others, though, may go well beyond the abilities of those untrained in security measures, such as protecting the scene for the purpose of gathering evidence. In his article on museum management, Pierre Schommer addresses the role of the staff in the museum. He describes them as “modest helpers of the directors and curators” accountable for the smooth running of the site, and that “museum administration must never forget that it often places its honor in their hands and that it transfers to them day and night many of its responsibilities.”<sup>52</sup> With staff playing such an important role for the museum, the impact of special events on them cannot be ignored.

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<sup>50</sup> G. Ellis Burcaw, *Introduction to Museum Work* (Walnut Creek, CA: AltaMira Press and American Association for State and Local History, 1997), 111.

<sup>51</sup> International Council on Museums, International Committee on Museum Security, *Museum Security and Protection* (London: Routledge and ICOM, 1993), 78.



## B. Impact on Collections

One of the important components of any museum is its collection, and historic house museums are no exception. With most historic house museums, the collections are centered on a particular person or period, and possibly features one or two key objects of national significance. Collections care has become a highly specialized field, with experts in every aspect of the care, management, storage, and display of the objects, but the impact of special events upon the collection rarely is addressed.

The impact on collections can range from loss of the entire object to simple damage to alteration of the collections environment. The chief means of total loss is theft. The theft can range from the skillful pocketing of a small item to a more orchestrated effort to steal a larger object. While theft may appear to be a relatively obvious threat to the collection, the risk may not be immediately recognized if the guests are perceived as friends of the museum. Most historic house museums already have some security measures to prevent theft in the course of normal operation, but often these requirements do not translate to special events. Certain regulations recommended by museum care and collections management specialists are often inappropriate for small historic house museums. For example, everything from closed-circuit television to motion and sonic detectors are suggested as solutions, as well as reinforcing historic wooden doors with metal sheeting.<sup>53</sup>

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<sup>52</sup> Pierre Schommer, "Administration of Museums," in *The Organization of Museums*, 4<sup>th</sup> ed. (Paris: UNESCO, 1978), 46-47.

<sup>53</sup> International Council on Museums, International Committee on Museum Security, *Museum Security and Protection* Ed. David Liston. (London: ICOM and Routledge, 1993), 135.



Beyond theft, collections damage can be something as simple as a chip on a vase to a red wine stain on the carpets or upholstery, or something less obvious, such as gradual wear on a carpet. In the case of special events, often the incident that caused the damage was not intentional, but merely something as simple as a tipped wineglass or a careless gesture. The damage may not even be caused by a special event guest, but the result of relocating objects in preparation for an event. Objects, such as chairs, may have to be relocated for the facilitation of special events, yet unless the method of moving has been clearly identified and explored, casualties are inevitable. According to *The Handbook for Museums*, "Objects are most vulnerable to damage when people are holding them."<sup>54</sup> Not only can the object be dropped, but also the simple contact of the human skin with the object surface can cause erosion and damage that can lead to further conservation problems.<sup>55</sup>

Unfortunately the literature geared towards the historic house administrator does not explicitly address what to do in the case of an object damaged in the course of a special event. When the literature does address appropriate responses for damage to collections, it is usually either at the micro level best dealt with by trained conservators, or the Act of God extreme that requires a whole different set of conservation policies. As with the security issues addressed previously, staff members will be required to act as an object conservator in a moment's notice. The typical employment requirements for an objects conservator include graduate-level work at an accredited facility, specialized internship dealing with their area of study, on the job training, and extensive research into conservation theory, practice, and

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<sup>54</sup> Edson and Dean, *The Handbook for Museums*, 58.

<sup>55</sup> *Ibid.*, p. 58.



materials characteristics. Since inappropriate treatment can be just as detrimental as the damage, harm can come to the collections by the very people that are there to care for them.

Another area where special events may indirectly impact collections is increasing the threat of pests, such as insects and rodents. One of the essential measures to prevent pest infestation is to keep all food and plants away from the collection, yet special events invite both in through the front door.

Special events also impact the carefully monitored environment created for the benefit of the collections. Extensive measures are taken by most museums to ensure that their objects are kept at an appropriate temperature and relative humidity. For most historic house museums with a collection of several different types of objects, finding that delicate balance can be difficult. According to Sherry Butcher-Youngmans in *Historic House Museums*, a museum “should strive for an optimal temperature range between 60° and 70° F and a relative humidity between 45 and 55 percent.”<sup>56</sup> Since temperature and relative humidity is intertwined, affecting one will change the other. Raising the temperature will decrease the relative humidity, but increase the capacity for the air to hold water vapor.

Once humidity levels reach a certain point, usually at about 70 percent, direct and indirect damage occurs to objects in the collection. Metals corrode, wood expands, and canvases sag, while pests, mold and mildew flourish in such conditions. Low humidity, considered anywhere below about 30 percent, also causes problems, such as shrinking and cracking.<sup>57</sup> While these levels can damage collections, nothing is as harmful as rapid

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<sup>56</sup> Butcher-Youngmans, *Historic House Museums*, p. 105.

<sup>57</sup> *Ibid.*, p. 106.





fluctuations between the extremes. For the most part, objects can accommodate gradual changes, but swift shifts are beyond the capabilities of most materials without irreversible damage.<sup>58</sup>

Special events may undo these best intentions. For a historic house museum that rents both the main house and the gardens, the visitors will circulate between both spaces. Given the nature of these types of events, odds are that the doors will be left open at one time or another, effectively breaking the seal between the conditioned and unconditioned spaces. Leaving doors open on a hot summer night do the collections no favors, as the influx of warm air and humidity alter the environmentally controlled conditions. Additionally, the heating and cooling systems will be forced to compensate for the shifts, placing strain on the collections, HVAC systems, and the building itself.

### **C. Impact on Building**

Beyond the staff and collections, the building is affected by the special events that take place in and around the structure. In addition to the event itself, the building also must provide all the background support for the caterers, band, and the like. It often seems that the actual building that triggered the formation of the museum in the first place is left to fend for itself once the museum is underway. Such care and concern is generated for the absolute correct care for the collections that little is left over for the structure that contains them.

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<sup>58</sup> Ibid., p. 107.



One of the biggest impacts on the actual structure is ensuring that the property meets all the expectations for functioning as a site for outside group use. Part of the reason people rent historic properties, especially the ornate mansions of the former members of the upper class, is to connect themselves, if for just a brief time, to a grand lifestyle that is not their own. Thus, the building must meet all those expectations, while hiding the modern conveniences that make such rental possible. Historic houses rarely meet modern building codes, however, and different use patterns have certain requirements, such as exit routes, ADA compliance, and so on. Fire code requirements, while determining the total number of people that can be in a given space at any one particular time, also trigger other alterations, such as exit signs, fire doors, push bars on existing exit doors, and fire suppression systems. Given that the functions of a museum are different than those of an event space, the code requirements will necessitate changes that the historic house may not be willing to make.

In addition to the changes needed to comply with code requirements, the historic house must also make changes based on the spaces for the event, as well as all the support spaces, such as kitchens and restrooms. Subsequently, the museum elects to convert spaces that it deems secondary into places dictated by the needs of the special events that take place there. Often, the converted spaces are part of the original configuration the site or property, such as a stable or carriage house. While the original purpose of these buildings is no longer extant, these structures become obvious options for the special event support. Given the choice of converting old, or building new, altering a vacant structure may be the most viable alternative for the museum. But the fact cannot be denied that the alteration from carriage house to kitchen results in both tangible and intangible loss to the site. Even the most



sensitive of conversions will result in loss of original fabric, even if it belongs to a relatively minor part of the whole site. Additionally, once the building has been converted into a space linked with a money-generating activity, it is less likely to return to any approximation of its original function.

The increased activity brought on by special events necessitates an altered maintenance schedule that impacts the building and its interiors. If the maintenance schedule is not altered to answer the increased needs triggered by special events, the museum may quickly achieve a dingy, dirty appearance that does little to boost staff morale, tourist numbers, or visitor experience. In an extreme example, an early morning walk down Bourbon Street in New Orleans quickly reveals the impact of trash on visitor perceptions of the French Quarter, especially as one attempts to pick a path among the plastic cups, abandoned beads, and bodily fluids.

As with the care of the collections, special knowledge may be required for the appropriate maintenance of the building. As Butcher-Youngmans recommends:

If you do not know how to clean properly the special materials that make up the historic house...it is best to do nothing at all until you have learned the appropriate methods. Irreparable damage is done at the hands of those who are eager but untrained.<sup>59</sup>

Special events import all kinds of things into the historic house museum, including food products and plants that may lead to unusual problems with the building fabric, such as grease stains on wooden flooring. The problem lies in delicate balance between keeping the



museum at an acceptable appearance without cleaning to such an extent that historic fabric is lost. As with polishing metal, cleaning removes a bit of the original fabric each time. Furthermore, careless housekeeping activities can damage materials, such as a vacuum repeatedly banging into a painted baseboard or furniture.

#### **D. Impact on Museum**

While special events obviously impact the staff, collections, and historic structures, the museum will also be affected, and the ramifications may reach beyond the one particular museum. Special events influence the reputation and public recognition of historic house museums, as well as how the public perceives the role of historic buildings. Several museums cited above listed additional notoriety as a reason for opening their doors for special events, and found that it brought the added bonus of increased visitor attendance, even to the extent of guests returning months or years after the special event they attended. Special events may have generated the desired response of increasing income through ticket sales.

As with other museum activities, special events trigger legal issues, particularly related to liability. Liability can be incurred by both “engaging, or failing to engage, in certain activities.”<sup>59</sup> The legal web of damages, rights, laws, torts, and contracts can be a messy affair at best, and special events are no exception. The museum can be legally liable

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<sup>59</sup> Ibid., p. 129.

<sup>60</sup> Marilyn E. Phelan, *Museum Law* (Evanston, IL: Kalos Kapp Press, 1994), 203.





for issues related to negligence, actions of its employees or volunteers, food and drink, visitor safety, and false imprisonment. For example, in cases such as *Baxter v. Morningside, Inc.* and *Malloy v. Fong*, courts held that a master-servant relationship exists between the museum and the volunteer, thus making the museum ultimately responsible for any negligent acts by the volunteer, particularly if the volunteer has been routinely working for the site.<sup>61</sup>

Beyond the legalities, special events can have an adverse effect on a museum's reputation. As previously addressed under the section on impact on buildings, the increased number of activities leads to increased wear and tear, leaving the building with a less than pristine appearance. While initially the unkempt grounds, chipped paint, and scarred floors may be minor damage, collectively they aid to an unkempt quality that will register with the guest, even if they are not aware of it. Gradually, the sloppy condition will spill over into the museum reputation, which does little to increase ticket sales, generate local support, or garner positive attention.

A potentially damaging impact of special events goes well beyond the property lines of the historic property. With historic sites offering themselves as venues for parties, weddings, and other temporary activities, the public no longer likens the site to the monumentality of the past, but the disposability of the present. The historic site becomes a commodity bought for transient means, to be used and then abandoned once its purpose is served. Since the obligation is by definition short lived, the guest has no interest in the preservation and care of the site, beyond ensuring that everything looks "good" for the wedding photos.

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<sup>61</sup> Ibid., p. 227.



Finally, the museum is affected by special events in the realm of visitor experience. Linking back to the fire code issues, the number of people allowed in the space is pre-determined. But that figure, generated purely by a mathematical formula based partly on number of exits, distance to those exits, and the size of the structure, gives the maximum number of people permitted on the site, but does not address the *optimum* number of people. For example, if fire code allows 400 people in a courtyard space, the museum uses that number as its maximum number of guests for an event. But the museum is ignoring some of the exercises it has most likely undertaken for its exhibit spaces and tour pattern. Since most museums offer a house tour as part of the rental packages, yet also place restrictions on when and how those tours can take place, the quality of the visitor experience will be compromised. Trying to move large groups of people through exhibition rooms does little but increase the risk of potential wear and tear to the building and collections, while treating the guests like cattle. Even in the less confining spaces, such as gardens and courtyards, the visitor experience is still harmed, by the press of bodies, altered circulation patterns, and the general eclipse of the site by the event taking place.



## **Chapter 4: Policy Recommendations**

Most historic house museums have established policies regarding collections care and building use, and most have specific policies regarding special events. Any event policy must have extensive detail to ensure loopholes are avoided. Since it is difficult to know every possible situation, some basic concepts should also be included to meet any additional requirements.

Butcher-Youngmans identifies some of the larger issues related to special events that must be included in the policy, such as who will review requests for rental and what areas will be rented. In addition, specifics must be addressed. For example, if the museum decides to rent out a parlor that includes original, period furnishings that are easily accessible, the museum may elect to move some of those furnishings out of the room before the event. Therefore, the policy should explicitly identify how to move the object, where it should be relocated to, who is in charge of moving it, and the time frame for the relocation related to the event. This level of detail is required for every aspect of the policy. As with all other museum policies, the special events policy must be regularly reviewed to ensure its efficacy. It must also be asked if the staff and skill exist to carry out such rules and regulations. Too often they do not.

A museum's resolution to begin renting for special events may be based on any number of factors, from a need for funds to a desire to compete with other historic house museums for a role in the community. Whatever the factors behind the decision, the



museum's best bet for ensuring the proper care and protection for it, its buildings, and its collections, is to enact a special events policy suitable for its needs.

The decision to host special events is a momentous one, for it impacts almost every aspect of the museum, from the gardens to the management. The museum must be sure it wants to assume both the burdens and the benefits associated with the hosting of special events. It is not a decision to be taken lightly. The following is a partial list of the issues a museum must address to create an appropriate special events policy:

- What types of events will the museum host?
- What spaces will the museum rent out for the events? Does the museum need to convert spaces for the events?
- How much will the museum charge per event? Will the cost vary according to attendance? Vary according to event?
- What hours will the museum make available for the events? Can special events rent spaces while the museum is open to the general public?

And these questions do not even address the needs related to staffing, collections care, site management, and building maintenance.

Once a museum determines the answers to some of these important questions, it can determine into which of the previously described categories it fits. Once the classification is established, the museum can then enact a suitable policy. Some of the chief concerns the museum must address are staffing, acceptable food service, hours, charges, what services the museum will offer, and numerous other issues. Each policy must correlate with the actions the museum takes in relation to the special events. Furthermore, routine evaluation of a





museum's policy, and the implications of the special events, will ensure that the museum is taking the proper precautions for the care of their building and collections.

### **General Recommendations**

Regardless of what type of special events a historic house museum decides to allow on its facilities, certain preventive measures can be taken to minimize the risk of damage caused by special events activities. These measure are simple to enact and enforce, and should be applied by any historic house museum that allows for special events. However, all have potential drawbacks that could affect the various components of the museum.

For environmental considerations, several strategies will ensure the proper environment is maintained for the building and collections. An extremely simple measure, one that has already been adopted by most house museums, is to not allow any smoking on the grounds. Smoke from cigarettes, cigars, or pipes can damage collections, particularly paintings. Additionally, smoking paraphernalia, such as lighters and matches, can easily induce flames that can lead to damage or destruction. Fluctuations in relative humidity and temperature can be mitigated by ensuring that doors are kept closed, which would require additional staff.

Collections protections can come in many forms. Given that theft has been identified as an impact of special events, ensure the safety of the collections that are accessible to the public during the special events. Simple measures can be taken, such as removing particular objects that are at high risk or encasing them to prevent access. Both pose potential



additional risk, since the object may be damaged in transit or by the microenvironment created in the new enclosure.

Furthermore, all food and drink should be kept well away from any exhibition spaces, to prevent not only damage from an accidental spill, but also to mitigate the risk of pest infestation. Once pests enter into the museum, great expenditures may be necessary to get rid of them.

As for building conservation, some of the same measures that are employed for protection of the original fabric from excessive wear can be used to combat special event damage. For example, original wooden floors can be covered with a mat to prevent oil from staining the flooring. Large mats can be placed at entrances, to trap the excess dirt and grit from guest's shoes before they track it into the house.

These simple measures can help a historic house museum reduce the risk of special events causing extensive damage to the building, grounds, and collection. However, their application must be consistent across all special events in order to be effective.

## **Category I**

A museum in this division, the ones with no outside party rental, can limit its special events policy to those events the museum deems necessary as part of its own functions, such as Board of Visitor dinners, or large scale special events, like an annual horse race held on the grounds. These events necessitate their own type of policies, due to their scope, rarity,



and extenuating circumstances. Some of the special event policies recommended herein may apply, but additional precautions and care must be taken.

## **Category II**

The museum that has elected only partial use, and falls into this category, the special events policy must meet the requirements imposed by the events. As with the Category I use described above, the decision to host special events requires the resolution of a number of issues related to staffing, collections, and building care.

A museum that already has spaces designated for special event use, such as a garden or carriage house, has already made one of the essential decisions related to special events, regarding where the events will be held. Although secondary spaces will most likely be the first spaces chosen by a museum as appropriate venues for special events, they still require an appropriate policy. For any structure that is part of the original complex related to the main house, alterations, wear and tear, and incompatible use all affect potentially significant architectural fabric. The museum can take simple measures to ensure that the least amount of damage occurs, such as protective carpets over original flooring. Sensitive renovations can also contribute to the retention of essential features.

For museums that use landscaped areas as spaces for special events, the safekeeping of important features can be extremely difficult, due to the nature of the special events. While a house or other building may escape unscathed from the activities of a couple hundred guests, the boxwoods and flowerbeds may not be as lucky. Since the landscape is



viewed as mutable, the damage may not be readily apparent. As with using a building, a museum can take some simple measures to ensure that the landscape features are kept safe. As with the Mackay Mansion, a museum can purchase additional grounds to ensure that important features are left unharmed. Other options include keeping the party well away from the orchards, gardens, and the like, with a well-designed fence or other barrier that keeps guests corralled, but does not detract from the experience or the landscape. With primarily exterior spaces as venues for special events, the additional threat of Mother Nature exists. The policy must also ensure that the museum has a plan for inclement weather.

Events held in outbuildings or gardens may have the advantage of more modern facilities, since the museum will most likely have to renovated spaces to meet the needs of the guests. The museum's policy must recognize the delicate balance between the retention of the original fabric or features and the new use that now take precedence. For example, keeping guests to a specified location on the grounds and limiting kitchen facilities are minor efforts that can greatly help the museum save important features.

Museums within this category must also address issues related to parking, movement of guests from parking areas to the rental spaces, tenting of the gardens or lawns, and trash disposal that prevents accumulation on the grounds.

### **Category III**

For museums that fit into this category, the special events policy should reflect the extensive access the guest has to the museum and its building and collection. These types of





museums often require the most explicit policies, for they are exposed to the greatest amount of risk. Almost every aspect of the special event must be tightly regulated for the greatest benefit, and must run the gamut from start to finish for the event. The policy should address everything from moving furniture for the event to proper disposal of the trash. As with the Category II policy, measure must be taken to protect the building and collections. By limiting some activities, such as no lit candles or no red wine, the museum can eliminate some of the more potentially devastating threats. While guests may initially object to some of the restrictions, it is all part of having events at historically and architecturally significant houses.

Since the museum is placing its collections and building at the highest risk, the benefit should be equivalent. While the local market ensures some controls will fall into place, some historic house museums can take advantage of their setting and facilities to charge significantly higher amounts for the use of their facilities. Of course, the museum can only charge what the market will bear, and it will always be subject to economic fluctuations, as a flush economy leads to more high-end special events held in the type of remarkable locations that historic houses can provide.

Often the policies in place addressing collections care, building management, and site administration can be modified to encompass special events issues. For example, collections policies allow museums to have a “clear direction” regarding their objects.<sup>62</sup> The best policies, the ones geared for prevention, cover all aspects of the collection, such as the goals

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<sup>62</sup> Marie Malaro, “Collections management policies,” chap. in *Collections Management* ed. Anne Fahy (London: Routledge, 1995), 11.



of the museum regarding its collection, loan procedures, and the method of recording the objects within the collection. Given the extensive nature of a typical collections policy, the museum's attitude towards its collection will already be well established, allowing for easy integration of the special events recommendations.



## Chapter 5: Conclusion

Today's historic house museums are in a position of crisis. No longer able to rely on deep pockets, or to close their eyes to the numerous financial demands upon them, historic house museums have been forced to seek out alternative sources of income, particularly special events. Consequently, historic house museums are caught between the lure of the special events and all that they bring, such as money and notoriety, and the dangers inherent in such activities. Special events impact and influence the historic house museum in such a number of ways, from the collections to the building to the grounds, that they cannot be dismissed as merely a sideline the museum participates in for fundraising purposes. Every management and policy decision the museum makes must take into account special events.

Most historic house museums recognize the risk involved with such activities, but have enacted policies that are reactive and not proactive. Only when an unfortunate incident occurs does the museum change its policy to reflect the new understanding of how special events can alter the museum. For example, at the Sprague Mansion, the restriction regarding red wine was not put in place until several years after the house began hosting special events, and a few accidents had occurred.<sup>63</sup> For the museum that rents for special events, the risk must be mitigated with a special events policy that meets special events head on. The policy cannot be too specific, for any room for interpretation is room for a problem. From what spaces can be rented to where the guests hang their coats should be addressed within the policy. Nothing should be left to be determined during the course of an event. The

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<sup>63</sup> Special Events Policy, Sprague Mansion, Cranston, Rhode Island, n.d.; and Mrs. Kelley, interview by author, 7 February 2001.



responsibility of the staff and the museum lies ultimately with the care and management of the building and its collections, and not with the temporary affair taking place at that moment. Therefore, the special events policy must serve the needs of them and their obligation to the museum.

Furthermore, a museum must admit to itself why it is becoming involved with special events in order to exploit the activity. Only when a museum has recognized what it is trying to accomplish can it set a path to achieve it. If the goal is purely financial, and special events are being allowed in the museum solely for monetary purposes, then the museum must ascertain what the market will bear, and determine the breaking point. Given the pervasiveness of "If it costs more, it must be better," certain historic house museums can exploit this maxim to their advantage. With the right marketing, clients, and contacts, a museum can establish itself within a particular elite echelon that will find value in its exclusivity. For a \$40,000 donation, a corporation can hold an event within the galleries of the Metropolitan Museum of Art in New York City. Although it has received some criticism for this policy, the Met remains booked for seven or eight events a week during high season.<sup>64</sup> For \$40,000 per event, figuring six weeks of seven events a week, the Met brings in almost \$1.7 million, and that does not include the other 46 weeks of the year. The Met and other museums, such as the National Museum of Natural History, have realized the potential of capitalizing on their position in society and the distinctive qualities of their facilities. Historic house museums would benefit by following their lead. Given that they can only charge what the market will bear, some museums may not be able to increase their rental fees





to such an extent, but others can certainly determine whether or not their fee can be raised and still be attractive to potential renters. Once a museum recognizes its use of special events, it can then integrate them the supporting policies and plan, such as marketing.

However, the museum must recognize the implications of such activities. A fine line exists between business-savvy and business-tawdry, especially when it comes to perceptions of both the public and the preservation field. A museum that rents out occasionally, such as the Dana-Thomas House, is under no particular threat of being perceived as a special events venue. Other historic houses, such as the Hathaway House in McGraw, New York, however, that meet National Register criteria, but do not operate as museums, and function solely as a location for special events, rarely enter the scholastic radar. A museum must seek out the delicate balance between actively seeking out the special events it has deemed necessary for its survival, but not appearing to eager about the process.

Therefore, reconciling the needs of the historic house, whether museum or site, with the effects of special events can be a difficult task, at best. In an ideal world, the museum would be visited by a select crowd of deferential visitors who also happen to be generous donors. Special events, on the other hand, bring in large crowds who are not focused solely on the museum, and may engage in destructive behavior. But the necessary evil of special events does bring in the money essential for maintaining the museum. In order to be successful with special events, historic house museums must fold the special events they invite into their facility into accordance with the goals and missions they have established for themselves. Per the definitions established by organizations such as AAM and ICOM, a

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<sup>64</sup> Harney, "Money Changers," 62.



museum serves as educator, collector, exhibitor, and guardian. Once special events exceed or obfuscate these original purposes of the museum, they have overstepped their boundaries.

A museum must go into special event rental with open eyes, recognizing both the benefits and burdens associated with such a decision. By determining the potential risks, and crafting a special events policy that answers those risks, a museum has established the means for obtaining the most profit out of a potentially dangerous situation. Individual museums must build a special events policy that supports their mission and purpose, as well as their goals.



## **Appendix A: Special Events Policies**

Special events policies were collected from the following historic house museums.

Ashton Villa  
Galveston, TX

Allison Mansion  
Indianapolis, IN

Avery-Copp House  
Groton, CT

Beauregard-Keyes House  
New Orleans, LA

Bodley-Bullock House  
Lexington, KY

Bowen House  
Woodstock, CT

Buckingham Meeting House  
Newark, OH

Chinque-Penn Plantation  
Reidsville, NC

Cliveden  
Philadelphia, PA

Codman House  
Lincoln, MA

Dana-Thomas House  
Springfield, IL

Decatur House Museum  
Washington, DC

Deepwood  
Salem, OR



Elliott House  
Kokomo, IN

Ensor-Keenan House  
Columbia, SC

Fioli  
Woodside, CA

Fletcher Pointe  
Indianapolis, IN

Gadsby's Tavern Museum  
Alexandria, VA

General Daniel Bissell House  
St. Louis, MO

Glensheen  
Duluth, MN

Gonzales-Alvarez House  
St. Augustine, FL

Gore Place  
Waltham, MA

Gunston Hall  
Mason Neck, VA

Hammond Castle Museum  
Gloucester, MA

Hartwood  
Pittsburgh, PA

Hathaway House  
McGraw, NY

Heritage House  
Riverside, CA





Hildene  
Manchester, VT

Isham-Terry House  
Hartford, CT

James J. Hill House  
St. Paul, MN

Kent Plantation  
Alexandria, LA

Kimbell-Jenkins Estate  
Concord, NH

Langdon House  
Portsmouth, NH

Lyman Estate  
Waltham, MA

Lyndhurst  
Tarrytown, NY

Mackay Mansion  
Virginia City, NV

Meux  
Fresno, CA

Noah Webster House  
West Hartford, CT

Old Sturbridge Village  
Sturbridge, MA

Pabst Mansion  
Milwaukee, WI

Park-McCullough House  
North Bennington, VT



Pierce House  
Lincoln, MA

Ralston Hall  
Belmont, CA

Ramsey House  
Knoxville, TN

Robert Mills House  
Columbia, SC

Schnull-Rauch House  
Indianapolis, IN

Sherwood Forest  
Charles City County, VA

Shirley Plantation  
Charles City County, VA

Sieberling Mansion  
Kokomo, IN

Spanish Monastery  
Miami, FL

Sprague Mansion  
Cranston, RI

Stan Hywet Hall  
Akron, OH

Stokely Mansion  
Indianapolis, IN

Taft Museum  
Cincinnati, OH

Texcuco Plantation  
Darrow, LA



Woodrow Wilson House  
Washington, DC

Wren's Nest  
Atlanta, GA

Wyandotte Museum/Ford MacNichol House  
Wyandotte, MI



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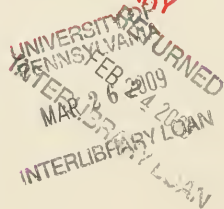
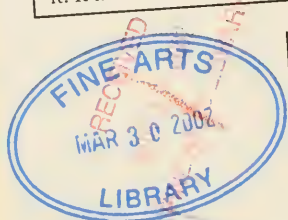
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